

**2014 WIC EBT User Group Meeting
July 22-24, 2014
Alexandria, VA**

Tuesday, July 22, 2014		
7:30am - 8:30am	Registration and Continental Breakfast	
*All sessions held in Presidential Ballroom		
8:30am - 9:00am	Introductions and Opening Remarks	<u>Presenter</u> Diane Kriviski-FNS
9:00am - 10:00am	FNS EBT Update Funding outlook, status of WIC EBT Nationwide, status of NUPC	<u>Presenter</u> Jerilyn Malliet-FNS
10:00am - 10:30am	Break	
10:30am - 12:00pm	Implementing EBT and MIS Together SA and contractor experiences for joint projects	<u>Presenters</u> Donna Bister-VT Johnny Sena-CDP Sylvia Mitchem-Xerox
12:00pm - 1:30 pm	Lunch (on your own)	
1:30pm - 2:45pm	Retailer Enablement SA and processor experiences	<u>Presenters</u> Shawn Brown-OK Gail Lumsden-FIS Jerry Owens-Xerox
2:45pm - 3:15pm	Break	
3:15pm - 4:45pm	Current SAM Update Updates on SPIRIT, MPSC, and Crossroads	<u>Presenters</u> Caroline Jackson-Crossroads MPSC Beverly Hancock-SPIRIT
4:45pm - 5:00pm	Wrap-up	

Wednesday, July 23, 2014			
7:30am - 8:30am	Registration and Continental Breakfast		
	Jefferson Ballroom	Roosevelt Ballroom	Washington Ballroom
8:30am - 9:30am	Revised EBT Section of Handbook 901 and the PAPD Understanding the new process <u>Presenters</u> Erin McBride-FNS Emily Waddoups-ID Carol Rowe-MN	Choosing an EBT Technology Which is right for your SA? <u>Presenters</u> Ellen Thompson-Maximus Penny Tisdale-Etegrity	EBT System Testing FNS role and expectations, SA experiences to help ensure successful testing <u>Presenters</u> Sandy Barton-FNS Dean Fortin-MA Kevin Zou-OH
9:30am - 9:45am	Break		
9:45am - 10:45am	EBT Planning RFP Writing the document and getting the most out of your planning project <u>Presenters</u> Stacey Neumann-AL Joe Ferrara-MD Kendall Quinton-SC	Managing Project Quality Take steps to safeguard project quality <u>Presenters</u> Art Burger-BCA Peter Relich-Maximus	Using EBT Data to Support Improved Program Operations Experiences from SAs that have implemented EBT <u>Presenters</u> Johnny Sena-CDP Fran Hawkins-KY John Hanneman-TX
10:45am - 11:00am	Break		
11:00am - 12:00pm	Project Plan/IAPD Making sense of the document and required elements <u>Presenters</u> Rob Longley-CT Chris Harr-MD Cheryl Owens-Maximus	Managing Project Schedule Help ensure your project timeline is reasonable <u>Presenters</u> Donna Bister-VT Gail Lumsden-FIS Sylvia Mitchem-Xerox	Food Package Session Banana Substitution, CAT/SUBCAT, Split Tender <u>Presenters</u> Erin McBride-FNS Patrice Williams-FNS Duane Grabarschick-TX
12:00pm - 1:30pm	Lunch (on your own)		

	Jefferson Ballroom	Roosevelt Ballroom	Washington Ballroom
1:30pm - 2:30pm	EBT Implementation RFP Getting the most from your document <u>Presenters</u> Scott Sloan-ME Cheryl Owens-Maximus	Training Clinic Staff Enabling clinic staff to succeed with EBT <u>Presenters</u> Melody Schrank-Chickasaw Vicki Martinez-FL Paula Garrett-VA	EMV: The Future of Electronic Payments Update on EMV and what is on the horizon <u>Presenters</u> Roque Solis-Solis Systems Marty Hopper-Verifone
2:30pm - 2:45pm	Break		
2:45pm - 3:45pm	Pilot Phase Steps to take to help ensure successful pilot <u>Presenters</u> Fran Hawkins-KY Gail Lumsden-FIS Brenda Berry-Solutran	Your Document Reference Shelf Finding Answers in the TIG, Operating Rules, Universal Interface <u>Presenters</u> Kimberly Word-OR Bonnie Belza-Booz Allen	Functions of SAM User Groups How do they work? <u>Presenters</u> MPSC Melinda Newport-SPIRIT Bob Screptock-Suntiva
3:45pm - 4:00pm	Break		
4:00pm - 5:00pm	Rollout Phase Going statewide and what to expect post implementation <u>Presenters</u> Priscilla Tiger-OK Sheila Brewer-VA Amy Duncan-CDP	Understanding UPCs UPC 101 and challenges retailers face <u>Presenters</u> Yvette Quintana-NM Jennifer Simpson-Kroger	Retailer Certifications How SAs can plan better and prepare for them <u>Presenters</u> Laurie Perrelli-MI Duane Grabarschick-TX Joe Jurich-VAR

Thursday, July 24, 2014		
7:30am - 8:30am	Registration and Continental Breakfast	
*All sessions held in Presidential Ballroom		
8:30am - 9:45am	Industry Showcase and Presentations Hear about products and services offered	<u>Presenters</u> Max Thayer-QuickWIC Amy Duncan-CDP Art Burger-BCA Dawn Cooley-Xerox Donna Seward-InRule Technology
9:45am - 10:00am	Break	
10:00am - 11:15am	Industry Showcase and Presentations Continued	<u>Presenters</u> Brenda Berry-Solutran Ann Ray-FIS Jay Saunders-CSC Thomas Innis-Ripples Group Ricky Aviles-Novo Dia Group
11:15am - 11:30am	Closing Remarks	<u>Presenter</u> Jerilyn Malliet-FNS
11:30pm - 1:00pm	Lunch (on your own)	
1:00pm - 5:00pm	Program Integrity - Facilitated Working Discussions (Federal and State only)	

Tuesday, July 22, 2014 Session Descriptions

*All sessions held in Presidential Ballroom

Implementing EBT and MIS Together - 10:30am-12:00pm

Presenters - Donna Bister-VT, Johnny Sena-CDP, Sylvia Mitchem-Xerox

As the 2020 mandate draws closer, implementing EBT and MIS together is becoming more of a reality. This session will share experiences from contractors who have assisted State agencies in completing joint implementations, and from a State agency that is planning for joint implementation.

Retailer Enablement - 1:30pm-2:45pm

Presenters - Shawn Brown-OK, Gail Lumsden-FIS, Jerry Owens-Xerox

Getting WIC food vendors ready to accept WIC EBT benefits is one of the more challenging tasks a State agency faces. Using an integrated electronic cash register (ECR) is a preferred approach because an ECR allows WIC items to be scanned once, eliminates clerk errors and is more efficient than stand-beside EBT equipment. Recent changes in the Farm Bill will cause many SNAP retailers, many who also participate as WIC vendors, to obtain commercial payment systems in lieu of free government provided payment equipment by September 21, 2014. This may also affect equipment for those same retailers who participate as WIC vendors. With these changes occurring, the speakers in this session will describe their efforts to enable WIC vendors to accept commercial payment systems.

Current SAM Update - 3:15pm-4:45pm

Presenters - Caroline Jackson-Crossroads, MPSC, Beverly Hancock-SPIRIT

Two of our three SAM systems, SPIRIT and Mountain Plains, are operational and available for transfer. The third SAM system, Crossroads, is fully operational in Virginia with Alabama, North Carolina, and West Virginia scheduled to complete rollout in the near future. Presenters representing each SAM User Group or Consortium will provide an overview of last year's accomplishments and goals for the upcoming year.

Wednesday, July 23, 2014 Session Descriptions

(By room location and session time)

Revised EBT Section of Handbook 901 and the PAPD - Jefferson - 8:30am-9:30am

Presenters - Erin McBride-FNS, Emily Waddoups-ID, Carol Rowe-MN

During the past year, FNS has published revisions to Handbook 901 related to WIC EBT project plans. The goals of the revisions were to streamline FNS approvals, reduce the documentation burden for State agencies and align the Advanced Planning Document (APD) process with contemporary Project Management processes used by many State agencies. This session will include an outline of the recent Handbook 901 changes and discussions with Idaho and Minnesota who have recently worked to get their Planning APDs approved.

Choosing an EBT Technology - Roosevelt - 8:30am-9:30am

Presenters - Ellen Thompson-Maximus, Penny Tisdale-Etegrity

When it comes to EBT technology there is no one size fits all solution for every State agency. This session will include information on online and offline EBT and how to decide which technology is the right fit for your State agency.

EBT System Testing - Washington - 8:30am-9:30am

Presenters - Sandy Barton-FNS, Dean Fortin-MA, Kevin Zou-OH

In March 2014 new system testing requirements were published by FNS that apply to all programs funded by FNS. These require all State agencies to provide test plans, test scripts and obtain FNS concurrence before pilot and expansion activities. The session will include presentations by FNS to outline the new requirements and FNS roles. WIC State agency representatives with recent experience in WIC EBT testing will also discuss their experiences in successfully testing.

EBT Planning RFP- Jefferson - 9:45am-10:45am

Presenters - Stacey Neumann-AL, Joe Ferrara-MD, Kendall Quinton-SC

Planning is the first phase in the EBT process, but how do you go about getting the right contractor to embark on this journey? This session will highlight the steps for writing a strong RFP which clearly specifies State agency requirements and ensures project needs are met. State agencies will share their own experiences in the process and give practical information to assist others who are at this stage.

Managing Project Quality - Roosevelt - 9:45am-10:45am

Presenters - Art Burger-BCA, Peter Relich-Maximus

Project quality, also known as Quality Assurance (QA) is a way to help prevent mistakes and avoid problems when implementing EBT and is critical to project success. This session will include presentations from industry stakeholders with extensive experience providing QA for EBT projects.

Using EBT Data to Support Improved Program Operations - Washington - 9:45am-10:45am

Presenters - Johnny Sena-CDP, Fran Hawkins-KY, John Hanneman-TX

After implementation of EBT there are many ways State Agencies can use the data. EBT data can be used to see what items are being purchased, the frequency participants shop, when items are purchased as well as what items are not being purchased. This session will give some perspective on how online and offline States are using the EBT data. Examples of the reports and tools (data warehouse, business intelligence, and standard reports) to access and analyze data will be shared to help States prepare and plan for how to use EBT data once it is available.

Project Plan/IAPD - Jefferson - 11:00am-12:00pm

Presenters - Rob Longley-CT, Chris Harr-MD, Cheryl Owens-Maximus

The project plan/IAPD is the framework of a successful EBT implementation. This session will include basics on the document and elements, and experiences from State agencies that have gone through the process of completing the document.

Managing Project Schedule - Roosevelt - 11:00am-12:00pm

Presenters - Donna Bister-VT, Gail Lumsden-FIS, Sylvia Mitchem-Xerox

Implementing EBT is a huge project. State agencies often depend on contractors unless they have a project manager on staff. Designing a reasonable project schedule and adhering to that schedule can be a challenge. Development, testing, retailer enablement, training (clinic staff, participants and vendors), pilot and rollout activities all must be considered and tracked. Determining how much time to designate to each of these activities is hard to do when you have not been through the process before. The experiences of contractors will give insights on how they successfully overcame some of the challenges they encountered, impacts to the project schedule and other risks to consider.

Food Package Session - Washington - 11:00am-12:00pm

Presenters - Erin McBride-FNS, Patrice Williams-FNS, Duane Grabarschick-TX

FNS finalized the new food rule on March 4th. This session will include a discussion of various aspects of the rule and the associated impacts on EBT. FNS will present proposed changes to the National Category and Subcategory table to accommodate new foods and practices required under the new rule, and alternatives for the provision which allows WIC State agencies the option to substitute fresh bananas at a rate of one banana per four ounces of jarred infant food fruit up to a maximum of 16 ounces. FNS will also be available to answer questions and ensure the intent of the regulations and all necessary parts of the final rule are considered in the solution. A State agency will provide an overview of the split tender provision as it relates to the smartcard environment.

EBT Implementation RFP- Jefferson - 1:30pm-2:30pm

Presenters - Scott Sloan-ME, Cheryl Owens-Maximus

The implementation RFP is critical to ensure State agency expectations and requirements for a processor are clearly stated. This session will include presentations from an industry stakeholder with extensive experience assisting State agencies in completing the document, and also from a State agency that has recently completed the document.

Training Clinic Staff - Roosevelt - 1:30pm-2:30pm

Presenters - Melody Schrank-Chickasaw, Vicki Martinez-FL, Paula Garrett-VA

Clinic staff is the front line of WIC with participants; training and preparing them for EBT is a critical activity. Use of contractors, state and local clinic staff or a mix of these is often used. Methods of training can vary as well; one-on-one, classes, webinars supplemented with handouts, videos and other materials are commonly used. The steps, activities, and lessons learned to train clinic staff from a State agency perspective will be shared in this session.

EMV: The Future of Electronic Payments - Washington - 1:30pm-2:30pm

Presenters - Roque Solis-Solis Systems, Marty Hopper-Verifone

The U.S. credit and debit payment system is undergoing significant upgrade to incorporate the Europay, MasterCard and Visa (EMV) smart card payment standards. Retailer card and payment systems must comply by October 2015. Credit cards are already being issued by banks that contain an EMV payment chip. Industry stakeholders from the card manufacturer and payment terminal viewpoints will provide insight into EMV implementation in the United States and discuss the potential implications for WIC EBT in the future.

Pilot Phase - Jefferson - 2:45pm-3:45pm

Presenters - Fran Hawkins-KY, Gail Lumsden-FIS, Brenda Berry-Solutran

Pilot phase is the first step in implementing a State agency EBT solution. How do you ensure for a successful pilot? This session will focus on how to prepare and what to expect during this all important phase. Gain perspective from both a State agency and industry point of view.

Your Document Reference Shelf - Roosevelt - 2:45pm-3:45pm

Presenters - Kimberly Word-OR, Bonnie Belza-Booz Allen

Have you ever wondered where you can find answers in the WIC EBT Operating Rules, the Technical Implementation Guide or the Universal Interface documents? What about X9.93 and X9.131? This session will discuss how these business rules and technical guidance can help answer questions during your EBT planning and implementation activities. It will also provide updates on what has happened this past year and potential updates to these essential reference sources for EBT implementation. Discussion will also occur with a State agency on how they have used these resources in their EBT implementations. The session is aimed toward nontechnical program staff.

Functions of SAM User Groups - Washington - 2:45pm-3:45pm

Presenters - MPSC, Melinda Newport-SPIRIT, Bob Screptock-Suntiva

State agencies choosing to transfer a SAM system are eligible to receive up to 100% Federal funding for the project if they also agree to join the User Group. This session will provide an overview of SAM User Group governance, change control process, how they operate, benefits of membership, restrictions on member activities, and the challenges which must be overcome when negotiating with other State agencies to ensure your State agency needs are met.

Rollout Phase - Jefferson - 4:00pm-5:00pm

Presenters - Priscilla Tiger-OK, Sheila Brewer-VA, Amy Duncan-CDP

Statewide rollout is the last phase of EBT implementation and is critical for a successful project. This session will include perspective on the processor role during rollout, experiences from a State agency that has completed rollout, and experiences from a State agency that is planning for rollout.

Understanding UPCs - Roosevelt - 4:00pm-5:00pm

Presenters - Yvette Quintana-NM, Jennifer Simpson-Kroger

Universal Product Codes (UPCs) are used to identify approved products available for purchase by participants with available WIC EBT benefits. This session will include some basics on UPCs, information on how they are used to support WIC EBT transactions, and State agency experiences using them.

Retailer Certifications - Washington - 4:00pm-5:00pm

Presenters - Laurie Perrelli-MI, Duane Grabarschick-TX, Joe Jurich-VAR

Now that the responsibility to certify retailers lies with State Agencies they must be prepared to plan and manage their retailer certifications. The options and what is best for a State will depend on resources, knowledge, funding, etc. This session will share the experience of an online State and an offline State and a POS provider to help States understand the different types of testing, the different players, and the different systems involved. Information on certifying independent grocers, cash register systems, integrated store systems, and stand beside systems and the level of testing that may be required for each will be shared.